PROCESSING, TRACKING, AND REPORTING ON FY2012-2013 SPECIAL LEAVE

To support Senate Bill 187 and the provision for FY2012-2013 Special Leave, the OSC HR/Payroll team has configured a new absence type to allow for the Special Leave to be reported on employees' time sheets. This absence type is not tied to a quota. Usage of this absence type can be reported through PT_BAL00 and CATS_DA for Time Administrators, and the Working Times Report in MSS. Monthly usage, total usage and remaining balance are also displayed on the Time Statement.

CAT2: Recording FY2012-2013 Special Leave on the Timesheet

1. Access **CAT2**.

2. Adjust the date if necessary.

3. Select **personnel number(s).**

4. Click the Pencil [pencil icon] button.

5. Enter **Absence Type 9711** or select it from the drop-down list.

6. Enter **up to 40 hours** of time for absence type 9711.

	NOTE: The new FY2012-2013 Special Leave absence type can only be used on scheduled work dates between 7/1/2012 and 6/30/2013. It will not appear in the drop-down list if the time sheet period displayed does not include a date within that range.
Information	

	NOTE: The time sheet screen will allow an unlimited number of 9711 hours to be reported. However, the Time Evaluation process will generate an error message if the FY2012-2013 Special Leave used-to-date total exceeds the employee's eligible amount as determined on 7/1/2012. To check on fiscal year-to-date usage, run the PT_BAL00 report *(see PT_BAL00: Determine the Fiscal Year-To-Date Amount Approved section)*.
Information	

Reporting on FY 2012-2013 Special Leave

Since the system allows employees to record more than 40 hours of FY2012-2013 Special Leave, Time Administrators can check the running totals using CATS_DA and PT_BAL00. Errors can be monitored using PT_ERL00.

- The CATS_DA report displays the total number of FY2012-2013 Special Leave hours entered by employees before managers have approved the time. If the CATS_DA report reveals excess Special Leave hours recorded, the Time Administrator can notify manager(s) prior to approval and processing in Time Evaluation.

- The PT_BAL00 report displays the totals after FY2012-2013 Special Leave hours have been approved by managers and processed in Time Evaluation. Time Administrators can run this report to monitor usage of A/A code 9711. PT_BAL00 can also be used to report on eligibility and remaining balances.

- The PT_ERL00 report displays the time evaluation errors related to the use of A/A code 9711.

CATS_DA: Display Employee FY2012-2013 Special Leave Hours Used

1. Access **CATS_DA**.

2. Select the appropriate working period.

3. Enter desired personnel numbers or Org units. The Organizational Unit field can be added to the selection criteria by clicking (Selection Fields).

4. Enter **9711** in Att. /Absence type field.

Display Working Times

OrgStructure   Search Help

Period

Reporting Period   Current Year ▼

Selection Criteria

Personnel Number		→
Employment Status		→
Company Code		→
Cost Center		→

Selection of Time Sheet

	Basic Data		
Activity Type		to	→
Task level		to	→
Task component		to	→
Activity Type		to	→
Stat. key figure		to	→
Att./Absence type	9711	to	→
Wage Type		to	→
Display Unit/Measure		to	→
Number (unit)		to	→
Processing status	10	to	40 →
Short Text		to	→
	Receiver account assgmt		◇
	Sender Account Assignment		◇
	Data Sources		■

Alternatively, you can select variant **/ZSL_9711REP** and key in appropriate personnel numbers or organizational units.

5. Click the **Execute (F8)** 🕐 button to run the report. Information on employees who have used Special Leave hours will display with the hour totals for each employee.

Display Working Times

| Employee/app.name	Pers.No.	Date	Status	Σ	Number	MU	A/AType	Created on	Time	Created by	Last change	Time
		07/17/2012			2	H	9711	07/24/2012	15:14:40		07/24/2012	15:14:40
		07/12/2012			10	H	9711	07/24/2012	14:52:43		07/24/2012	14:52:43
		07/11/2012			10	H	9711	07/24/2012	14:52:43		07/24/2012	14:52:43
		07/10/2012			10	H	9711	07/24/2012	14:52:43		07/24/2012	14:52:43
		07/09/2012			10	H	9711	07/24/2012	14:52:43		07/24/2012	14:52:43
				▪	42	H						
		07/26/2012			0.500	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/18/2012			1	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/17/2012			5	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/12/2012			0.100	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/11/2012			1	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/10/2012			0.500	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
		07/09/2012			2	H	9711	07/24/2012	16:43:49		07/24/2012	16:43:49
				▪	10.100	H						
		07/26/2012			10	H	9711	07/24/2012	14:37:48		07/24/2012	14:37:48
		07/25/2012			10	H	9711	07/24/2012	14:37:48		07/24/2012	14:37:48
		07/24/2012			10	H	9711	07/24/2012	14:37:48		07/24/2012	14:37:48
		07/23/2012			2	H	9711	07/24/2012	14:37:48		07/24/2012	14:37:48
		07/19/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/18/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/17/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/16/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/12/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/11/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/10/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
		07/09/2012			1	H	9711	07/24/2012	12:40:53		07/24/2012	12:40:53
				▪	40	H						
		07/13/2012			8	H	9711	07/24/2012	20:24:50		07/24/2012	20:24:50
				▪	8	H						

Information

NOTE: To create a variant for saving your ORG Unit Data, follow the steps in the Create Selection Variant Quick Reference Guide accessible through the following path on the Training HELP website.

http://www.osc.nc.gov/training/osctd/help/index.html

General Information > Job Aids > Create Selection Variant

PT_BAL00: To Check Eligibility and Allowed Hours for Special Leave
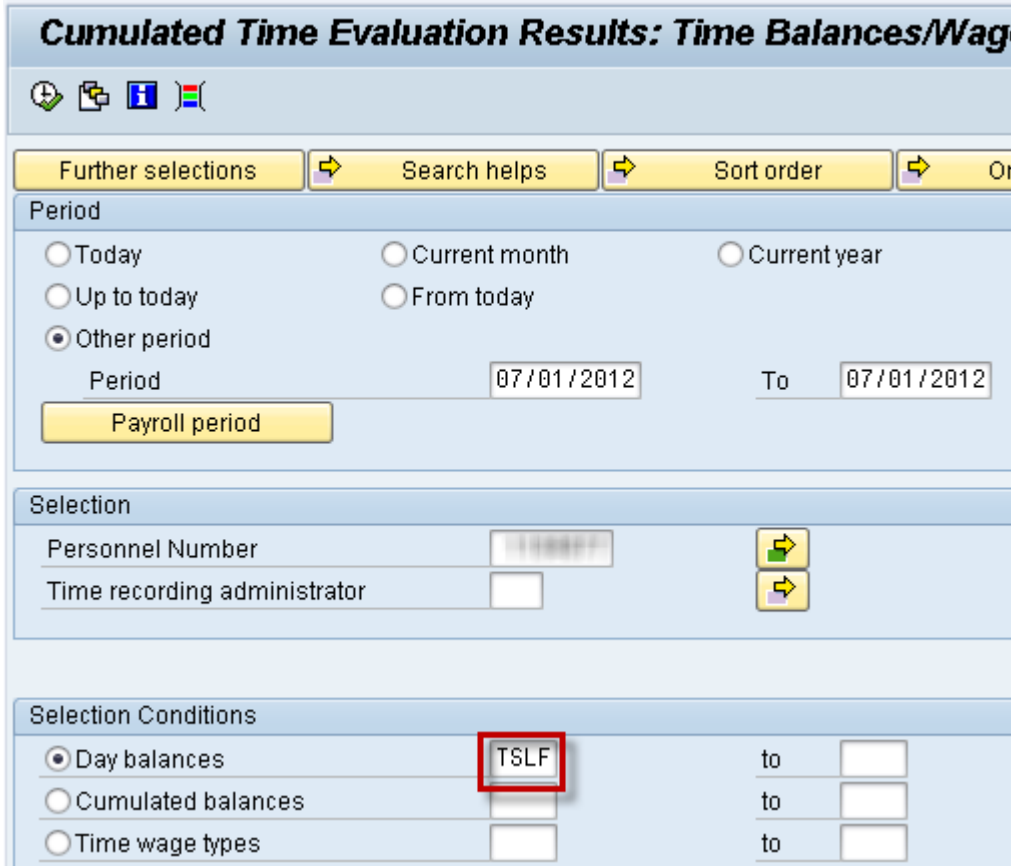
Upon implementation of the FY2012-2013 Special Leave absence code, a retro Time Evaluation run will be processed for all employees to 7/1/12. If an employee is eligible for FY2012-2013 Special Leave per the provisions of SB 187 and OSP policy, then the number of hours for which an employee is allowed will be stored on Time Type **TSLF**. This value will be carried forward from 7/1/12 through 6/30/13 and will be used as the comparison point to determine whether an employee has recorded more FY2012-2013 Special Leave than he/she was eligible for on 7/1/12.

Note: Permanent fulltime employee will have TSLF = 40. Permanent part-time employees that are half-time or greater will have TSLF equal to a value between 20 and 39, depending on employee's weekly working hours. Ten month employees will have TSLF = 33.33. Eleven month employees will have TSLF = 36.67.

Note: Per policy, all employees on LOA in LWOP status are not eligible for FY2012-2013 Special Leave until they are reinstated. The system will still set TSLF for these employees. Agencies should monitor usage to ensure the leave is not taken until the employee is reinstated.

To determine an employee's eligible amount of FY2012-2013 Special Leave:

1. Access **PT_BAL00**.

2. Select a single date in the in the Period box.

3. Enter **personnel number(s)** or **Org Unit** in the Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the *Further selections* [Further selections] button).

4. Enter **TSLF (Special Leave Entitlement)** in the Day balances field under Selection Conditions.

Alternatively, you can select variant **/ZSL_ELIGHRS** and key in appropriate personnel numbers or organizational units.

    5.   Click the **Execute (F8)** ⊕ button to run the report.

Day balances

Data select. period 07/01/2012 - 07/01/2012

Pers.No.	Employee/app.name	Period	Current Date	TmType	Time type descript.	ΣNumber
		201207	07/01/2012	TSLF	Special Leave Entitlement	29.16
		201207	07/01/2012	TSLF	Special Leave Entitlement	36.67
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	25.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	25.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
		201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
						▪ 475.83

Note: All New Hires and non-LOA reinstatements effective 7/2/12 or after are not eligible for FY2012-2013 Special Leave.

PT_BAL00: Determine the Amount Approved During Specific Time Frames

1. Access **PT_BAL00**.

2. Select the **date range** in the Period box.

3. Enter **personnel number(s)** or **Org Unit** in the Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the *Further selections* [Further selections] button).

4. Enter **TSLU (Special Leave Used)** in the Day balances field under Selection Conditions.

Alternatively, you can select variant **/ZSL_DAILYUSE** and key in appropriate personnel numbers or organizational units.

5. Click the **Execute (F8)** button to run the report. Each row represents a single date and the FY2012-2013 Special Leave (A/A 9711) hours used on that date.

Cumulated Time Evaluation Results: Time Balances/Wage Types

🔍 ▽ | 🖨 ▽ | 🗗 🗗 Choose | 🗗 Save | Σ 🔀 | 🗇 🗗 📝 | ▦ ▦ ABC | 🗐 Pr

Day balances

Data select. period 07/01/2012 - 07/31/2012

Pers.No.	Period	Current Date	Time type ▲	Time type descript.	Σ	Number
	201207	07/09/2012	TSLU	Special Leave Used		10.00
	201207	07/10/2012		Special Leave Used		10.00
	201207	07/11/2012		Special Leave Used		10.00
	201207	07/12/2012		Special Leave Used		10.00
			TSLU	🖳	▪	40.00
🖳					▪ ▪	40.00

PT_BAL00: Determine Cumulative Amount Approved in a Calendar Month

1. Access **PT_BAL00**.

2. Select the **date range** in the Period box.

3. Enter **personnel number(s)** or **Org Unit** in the Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the *Further selections* | Further selections | button).

4. Enter **TSLU (Special Leave Used)** in the Cumulated balances field under Selection Conditions.

Alternatively, you can select variant **/ZSL_MONTLYTOT** and key in appropriate personnel numbers or organizational units.

5. Click the **Execute (F8)** button to run the report. Each row represents the cumulated number of FY 2012-2013 Special Leave (A/A 9711) hours for an employee for a calendar month.

Cumulated Time Evaluation Results: Time Balances/Wage Types

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Cumulated balances

Data select. period   07/01/2012 - 07/31/2012

Pers.No.	Period	TmType	Time type descript.	Σ Numb...
▓▓▓▓▓▓	201207	TSLU	Special Leave Used	40.00
				▪ **40.00**

PT_BAL00: Determine the Fiscal Year-To-Date Amount Approved

1. Access **PT_BAL00**.

2. Select **Today** or a past date for which you want to see the Fiscal Year 2012-2013 YTD amount in the Period box.

3. Enter **personnel number(s)** or **Org Unit** in the Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the *Further selections* [Further selections] button).

4. Enter **TSLT (Special Lv Used FY12-13)** in the Day balances field in the Selection Conditions box.
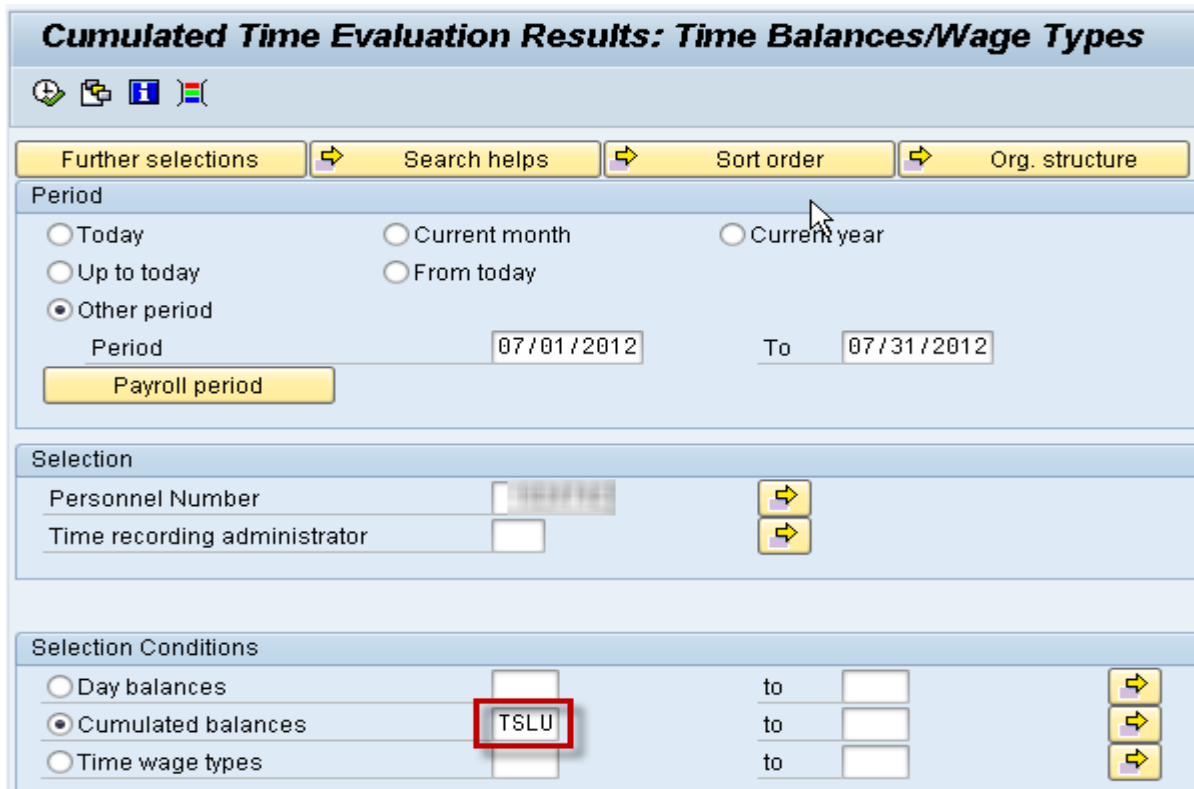
Alternatively, you can select variant **/ZSL_YRTODATE** and key in appropriate personnel numbers or organizational units.

5. Click the **Execute (F8)** [icon] button to run the report.

   Note: Time Type **TSLT (Special Lv Used FY12-13)** will be populated every day, so running this report for a date range may return multiple records, one for each day the employee had a YTD total.
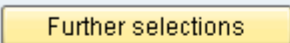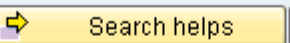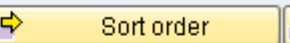
Cumulated Time Evaluation Results: Time Balances/Wage Types

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Day balances

Data select. period 07/16/2012 - 07/16/2012

Pers.No.	Period	Current Date	TmType	Time type descript.	Σ Numb...
	201207	07/16/2012	TSLT	Special Lv Used FY12-13	40.00
					▪ 40.00

PT_BAL00: Determine the Special Leave Remaining Balance
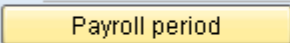
1. Access **PT_BAL00**.

2. Select the appropriate date selection amount in the Period box.

3. Enter **personnel number(s)** or **Org Unit** in the Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the Further selections [Further selections] button).

4. Enter **TSLR (Special Leave Remaining Balance)** in the Day balances field.

Alternatively, you can select variant **/ZSL_REMAINING** and key in appropriate personnel numbers or organizational units.

5. Click the **Execute (F8)** button to run the report.

Day balances

Data select. period 08/01/2012 - 08/01/2012

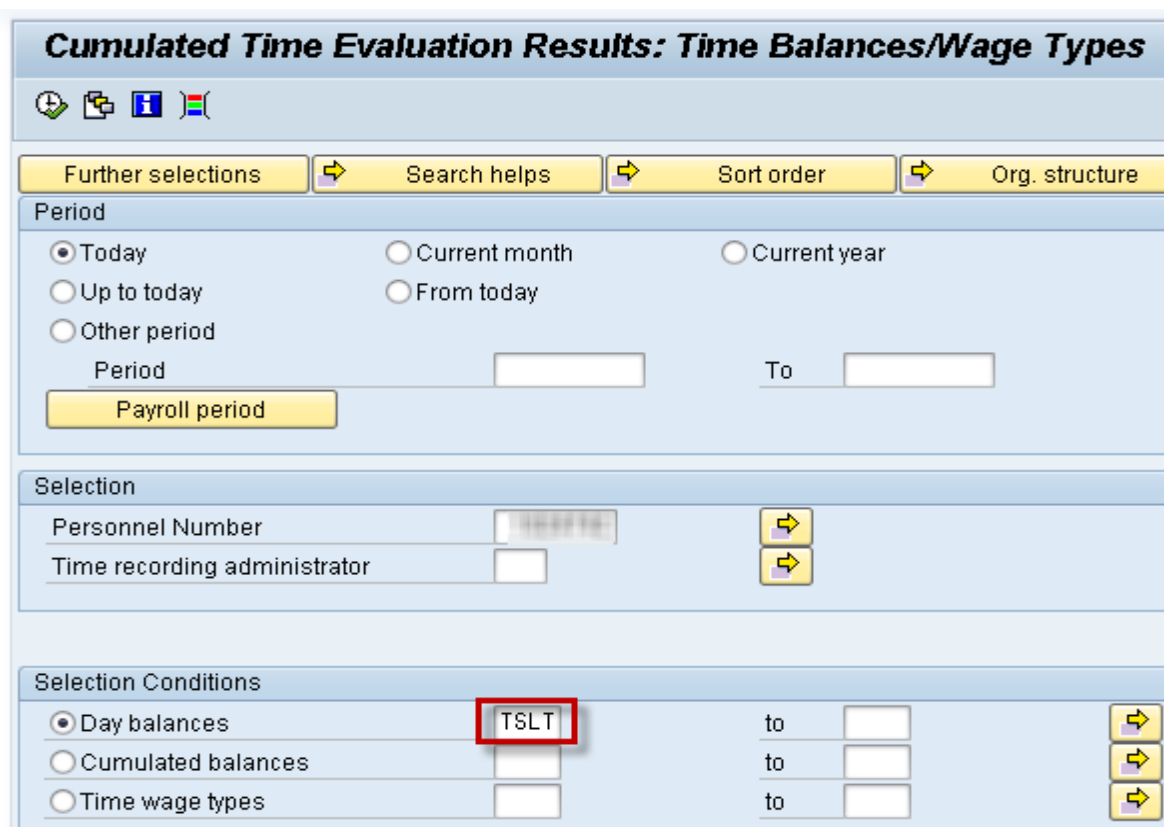| Pers.No.	Period	Current Date	TmType	Time type descript.	Σ Number
	201208	08/01/2012	TSLR	Special Leave Remaining	24.00
	201208	08/01/2012	TSLR	Special Leave Remaining	29.90
	201208	08/01/2012	TSLR	Special Leave Remaining	30.00
	201208	08/01/2012	TSLR	Special Leave Remaining	32.00
	201208	08/01/2012	TSLR	Special Leave Remaining	38.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00
	201208	08/01/2012	TSLR	Special Leave Remaining	40.00

Note: Time Type **TSLR (Special Leave Remaining)** will be populated every day until the value is = 0, so running this report for a date range may return multiple records, one for each day the employee had a remaining balance value

PT_ERL00: Identify Time Evaluation Errors Related to FY 2012-2013 Special Leave

Errors related to the use of FY2012-2013 Special Leave can be monitored using PT_ERL00. There are two errors associated with FY2012-2013 Special Leave:

D6 - Hours w/Special Leave > Expected

Meaning: This message will be generated when an employee's use of A/A 9711 takes the employee over his/her expected hours for the overtime period.

Solution: Adjust time entries so that only enough A/A 9711 is keyed to meet the employee's expected hours for the period. The employee will then have the leave to take at a later date.

D7 - Total Special Leave > Allowed Amt

Meaning: This message will be generated when an employee's use of A/A 9711 from 7/1/12 through current date exceeds the employee's eligible amount on 7/1/12 (as stored on Time Type TSLF).

Solution: Adjust the most recent A/A 9711 entries so that employee only reports the amount for which he/she is eligible.

To view FY2012-2013 Special Leave related errors:

1. Access **PT_ERL00**.

2. Select **Up to today** under Period box.

3. Key **Personnel number** or **Org unit** number under Selection box. (The Organizational unit field can be added to the Selection Screen by selecting the Further selections [Further selections] button).

4. Key **E** in Message type under Error attributes.

5. Enter **D6** and **D7** under Number of Message Type.

Time Evaluation Messages Display

Further selections ➡ Search helps ➡ Sort order

Period

○ Today ○ Current month ○ Current year
◉ Up to today ○ From today
○ Other period

Data Selection Period		To	
Person selection period		To	

Payroll period

Selection

Personnel Number		➡
Employment status		➡
Company Code		➡
Payroll area		➡
Organizational unit		➡
Pers.area/subarea/cost cente		➡
Employee group/subgroup		➡

Error attributes

Category of Message Type		to	
Number of Message Type	D6	to	D7
Message type	E	to	
List indicator		to	

Alternatively, you can select variant **/ZSPECIALLEAVE** and key in appropriate personnel numbers or organizational units.

6. Click the **Execute (F8)** button to run the report.

Time Evaluation Messages Display

Object name	Mess.	Message long text	PersNo.	Employee/app.name	CD	Logical date
COR SO DS2 PRI E Pasq CA C/O C L S06	D6	Hours w/Special Leave > Expected			SA	07/28/2012
OSC BEACON PROD/TECH Functional		Hours w/Special Leave > Expected			SA	07/14/2012
OSC BEACON PROD/TECH Functional		Hours w/Special Leave > Expected			SA	07/21/2012
OSC BEACON PROD/TECH Functional		Hours w/Special Leave > Expected			SA	07/21/2012
OSC BEACON PROD/TECH Functional	D7	Total Special Leave > Allowed Amt			TU	07/17/2012
PI SS ASIS HI NCSD		Total Special Leave > Allowed Amt			TH	07/12/2012

Eligibility Scenarios Requiring BEST Assistance

1) An employee is suspended on 7/1/12

If an employee is suspended on 7/1/12, they will not have a value populated in Time Type TSLF, causing error D7 when the employee attempts to record A/A 9711. Upon reinstatement from Suspension, a ticket should be submitted to BEST so that the employee's eligibility and appropriate hours can be set in the HR/Payroll system.

2) An employee is suspended at some point within eligibility period

If an employee is suspended at some point within the eligibility period of 7/1/12-6/30/13, the employee's eligibility and remaining hours will be lost. Upon reinstatement from Suspension, a ticket should be submitted to BEST so that the employee's eligibility and appropriate hours can be set in the HR/Payroll system.

3) An employee transfers from a non-BEACON to BEACON agency

If an employee is transferred from a non-BEACON to BEACON agency effective 7/2/12-6/30/13, and has a remaining balance of FY2012-2013 Special Leave to transfer from the previous state agency, a ticket should be submitted to BEST so that the employee's eligibility and appropriate remaining balance can be set in the HR/Payroll system.

4) A RIF EE is reinstated

If an employee is separated due to RIF from 7/1/12 to 6/30/13 without having the opportunity to use all allowed FY2012-2013 Special Leave and is reinstated prior to 6/30/13, a ticket should be submitted to BEST so that the employee's eligibility and appropriate remaining balance can be set in the HR/Payroll system.

Note: All New Hires and Reinstatements from Separations effective 7/2/12 or after are not eligible for FY2012-2013 Special Leave.

ZNCTIME: New FY2012-2013 Special Leave Section on Time Statement

A new section titled **FY2012-2013 Special Leave** will be shown on the Time Statement for eligible employees. Three balances will be reported in the new section:
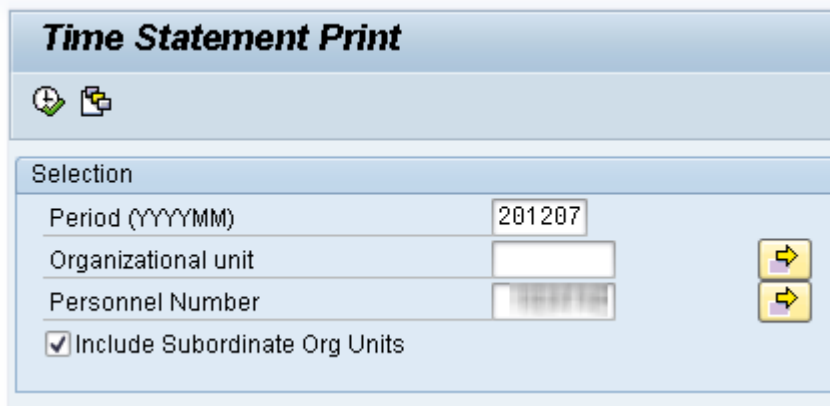
> *Monthly Amount Used* - This value will contain the total hours used for the month of the Time Statement.

> *Total Amount Used* - This value will contain the total hours used for period of time between July 2012 and the month of the Time Statement.

> *Remaining Balance* - This value will contain the total remaining hours on the last day of the month of the Time Statement or the total remaining balance as of today, if the Time Statement is run for the current month.

To view Employee Time Statements:

1. Access **ZNCTIME**.

2. Key in appropriate period.

3. Select appropriate organizational unit(s) or personnel number (s).

4. Click the **Execute (F8)** button to run the report. The new **FY 2012-2013 Special Leave** section displays.

Time Stater

Period: 08/01/2012 to 08/

Run Date: 07/29/20

Personal / Organizational Data

Name		Overtime
Personnel Number		Work S
Length Of Service	45.00 Months	Emp Gr
Position		Sub Are
Personnel Area		Time Mg
Org Unit Name		Org Unit

Leave Quotas (hours available)

Description	Beginning	Accrued	Deducted	Paid
Vacation Leave	37.81	9.33		
Sick Leave	28.00	8.00	9.00	
Holiday Comp Time	88.00			
Holiday leave	0.00	8.00		
Community Service	24.00			

FY 2012-2013 Special Leave

Description	
Monthly Amount Used	10.00
Total Amount Used	37.00
Remaining Balance	3.00

New Section

Summary: A/A Code, Time Types, & Error Codes Related to FY2012-2013 Special Leave

A/A Code 9711

A/ATy...	Att./abs. type text	Start Date	End Date
9711	FY2012-2013 Special Leave	07/01/2012	06/30/2013

Time Types Used in PT_BAL00

TSLU – Special Leave Used – Shows daily usage of 9711

Pers.No.	Period	Current Date	Time type	Time type descript.	Σ Number
	201207	07/09/2012	TSLU	Special Leave Used	10.00
	201207	07/10/2012		Special Leave Used	10.00
	201207	07/11/2012		Special Leave Used	10.00
	201207	07/12/2012		Special Leave Used	10.00
			TSLU		**40.00**

TSLT – Special Lv Used FY12-13 – Shows total fiscal year-to-date usage

Pers.No.	Period	Current Date	TmType	Time type descript.	ΣNumb...
	201207	07/16/2012	TSLT	Special Lv Used FY12-13	40.00

TSLR – Special Leave Remaining - Shows employee's remaining balance on any given day

Pers.No.	Period	Current Date	TmType	Time type descript.	ΣNumb...
	201207	07/07/2012	TSLR	Special Leave Remaining	40.00
	201207	07/08/2012	TSLR	Special Leave Remaining	40.00
	201207	07/09/2012	TSLR	Special Leave Remaining	30.00
	201207	07/10/2012	TSLR	Special Leave Remaining	20.00
	201207	07/11/2012	TSLR	Special Leave Remaining	10.00
					140.00

TSLF – Special Leave Entitlement - Shows the number of hours an employee is entitled to as determined on 7/1/2012.

Pers.No.	Period	Current Date	TmType	Time type descript.	ΣNumb...
	201207	07/01/2012	TSLF	Special Leave Entitlement	40.00
					40.00

Time Evaluation Errors

MessTy	Message long text
D6	Hours w/Special Leave > Expected
D7	Total Special Leave > Allowed Amt

NOTE: For policy information, go to the Office of State Personnel's FY2012-2013 Special Leave Policy. (Use the Back button to return to this document after reviewing the policy).